

QUARTERLY MARKET UPDATE

July to September 2021



Quarterly Market Update – Q3 2021

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TATT: 2/10/1/3

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Free-to-Air TV Market

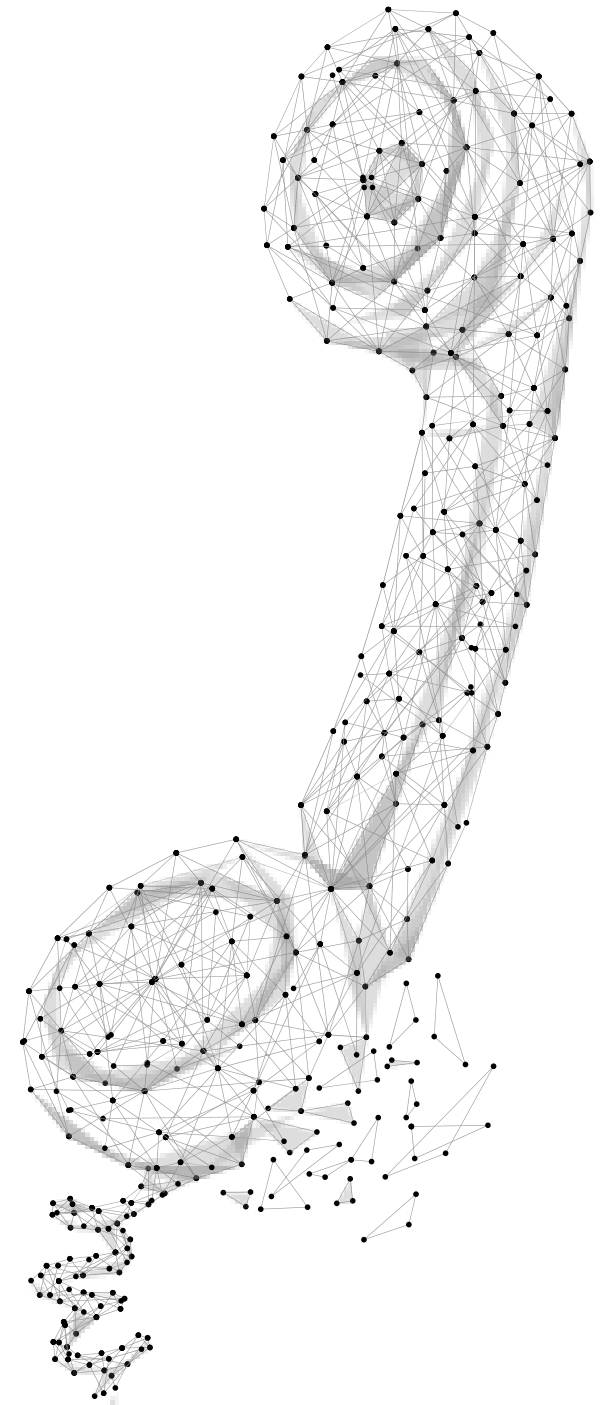
Notes

- 1. Fixed Internet Market includes fixed wired and fixed wireless Internet.**

- 2. Penetration rates have been calculated using the following population figures:**
 - a) 1,367,558 (2021 Mid-year population estimate, Central Statistical Office)**

 - b) Number of households - 401,382 (Trinidad and Tobago 2011 Population and Housing Census Demographic Report, Central Statistical Office)**

Fixed Voice



Fixed Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

343,900



Y-o-Y PERCENT CHANGE

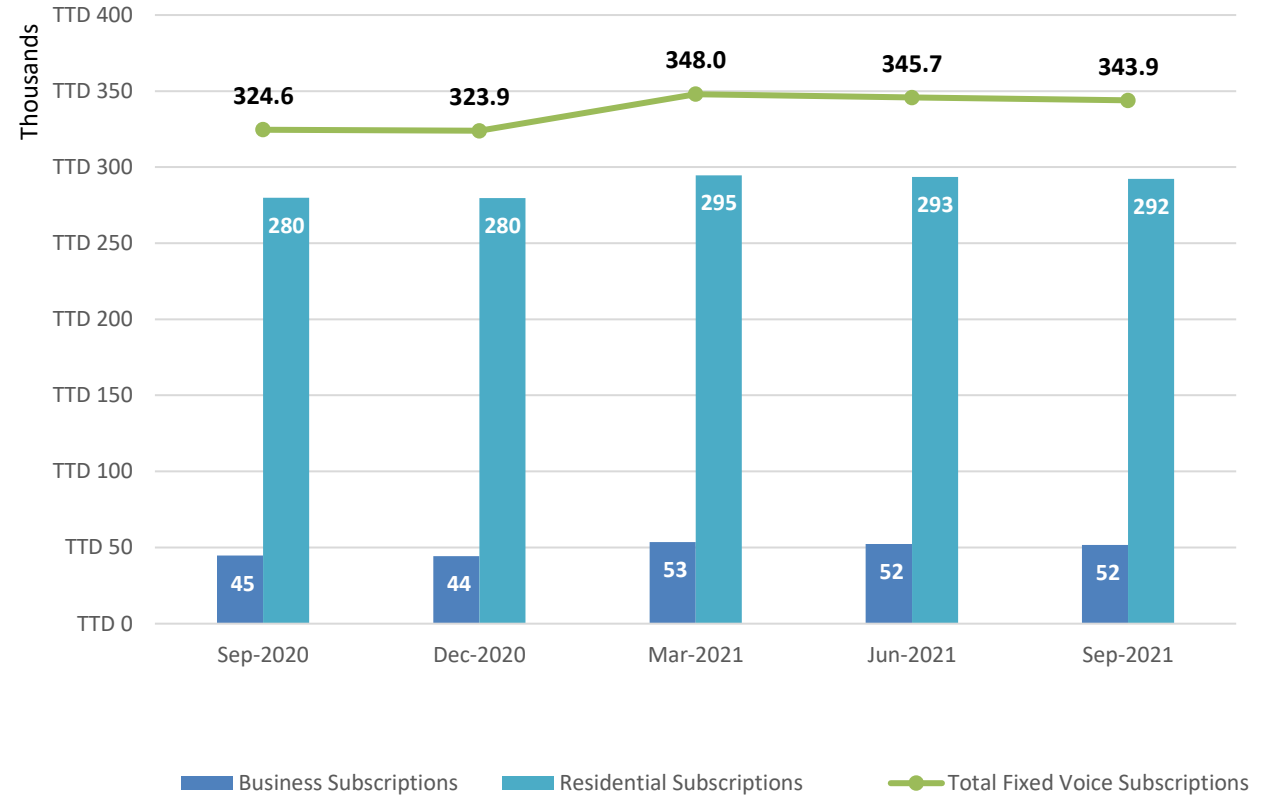
5.9%



Q-o-Q PERCENT CHANGE

-0.5%

Number of Fixed Line Subscriptions
Q3 2020 to Q3 2021



Fixed Voice Penetration



**FIXED VOICE
PENETRATION PER
100 INHABITANTS**

25.1



**Y-o-Y
PERCENT
CHANGE**

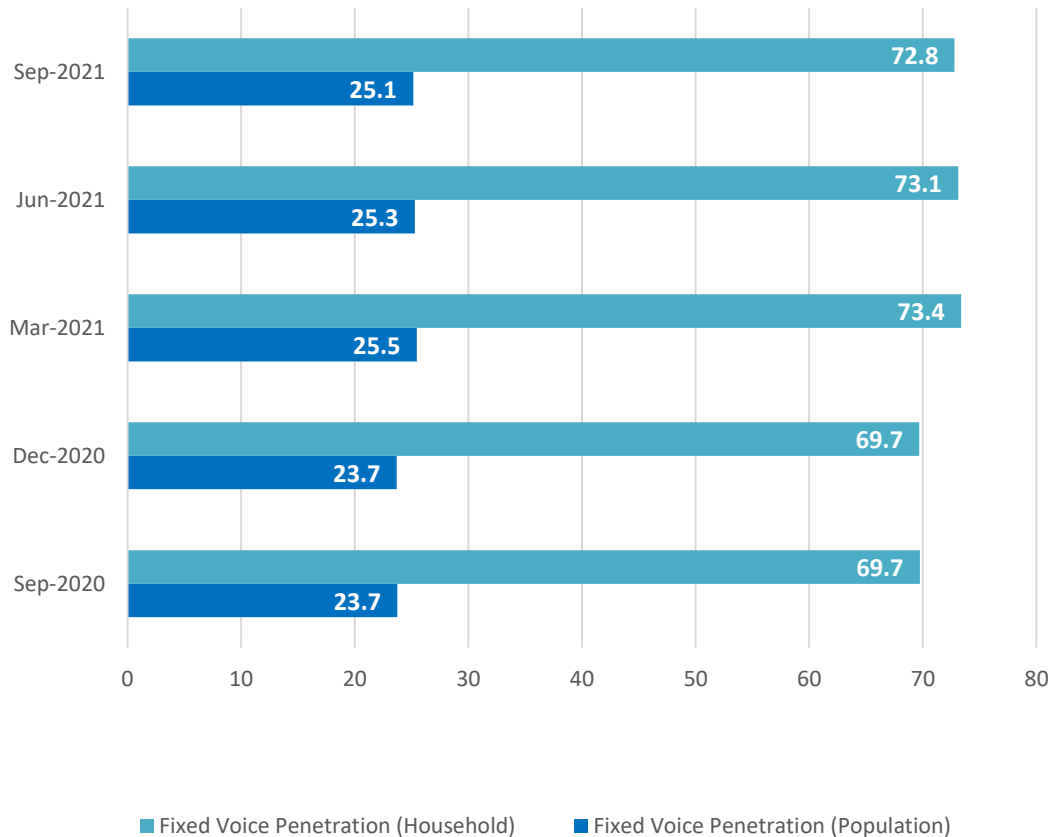
5.9%



**Q-o-Q
PERCENT
CHANGE**

-0.5%

**Penetration Rate of Fixed Line Subscriptions
from Q3 2020 to Q3 2021**



**FIXED LINE
PENETRATION PER
100 HOUSEHOLDS**

72.8



**Y-o-Y
PERCENT
CHANGE**

4.4%



**Q-o-Q
PERCENT
CHANGE**

-0.4%

Fixed Voice Revenues



GROSS REVENUES

\$ 104.7m



Y-o-Y PERCENT CHANGE

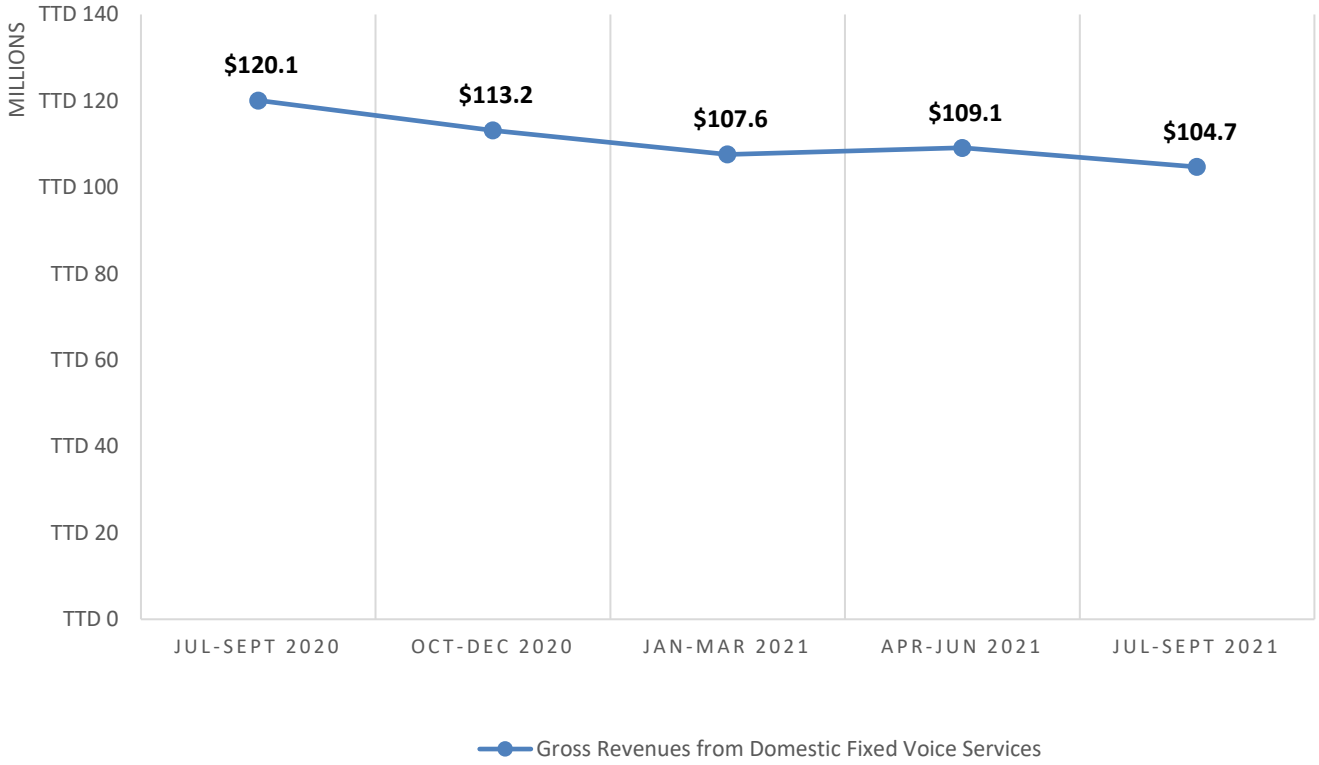
-12.8%



Q-o-Q PERCENT CHANGE

-4.1%

GROSS REVENUES FROM DOMESTIC FIXED VOICE SERVICES FROM Q3 2020 TO Q3 2021



Fixed Voice HHI

HHI for Domestic Fixed Line
from Q3 2020 to Q3 2021



HHI

3,523



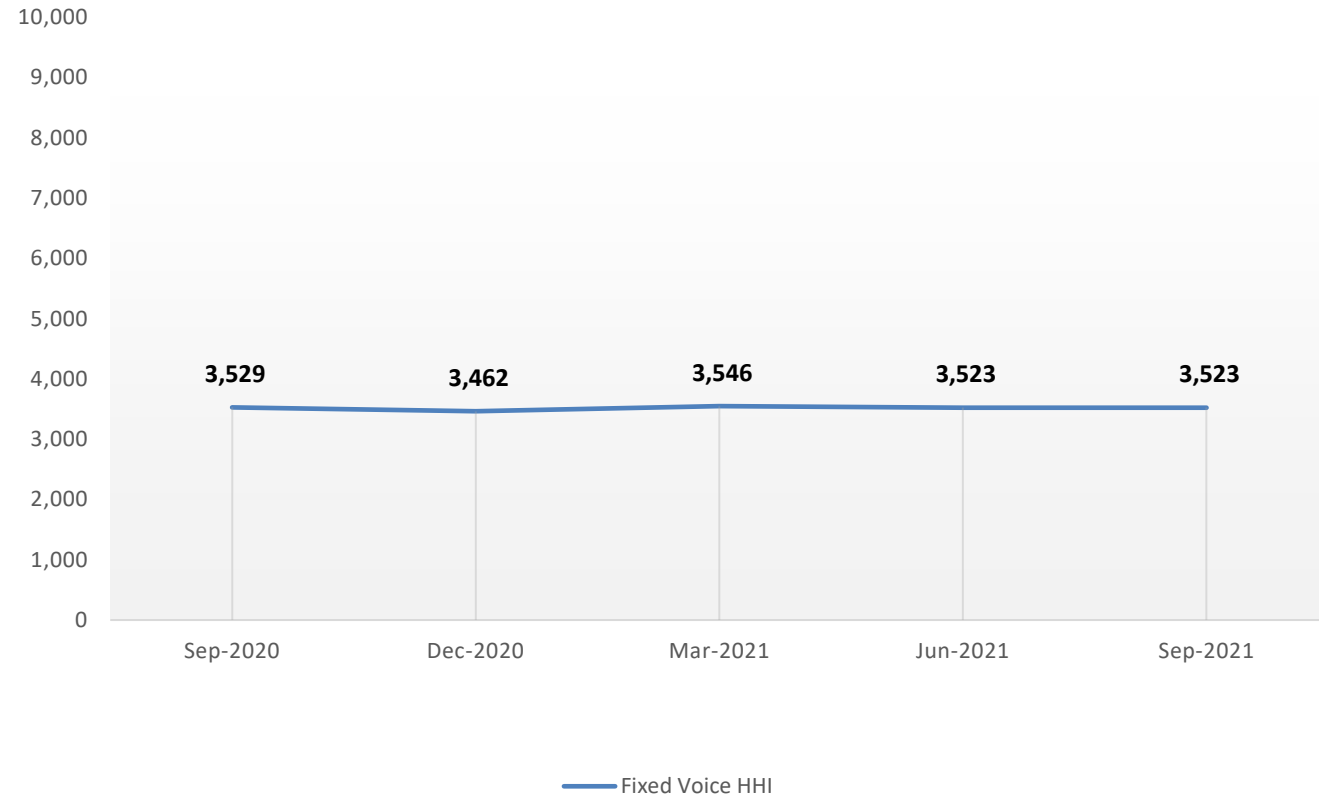
Y-o-Y
PERCENT
CHANGE

-0.2%



Q-o-Q
PERCENT
CHANGE

0.0%



Fixed Voice Average Revenue Per User



ARPU
\$304

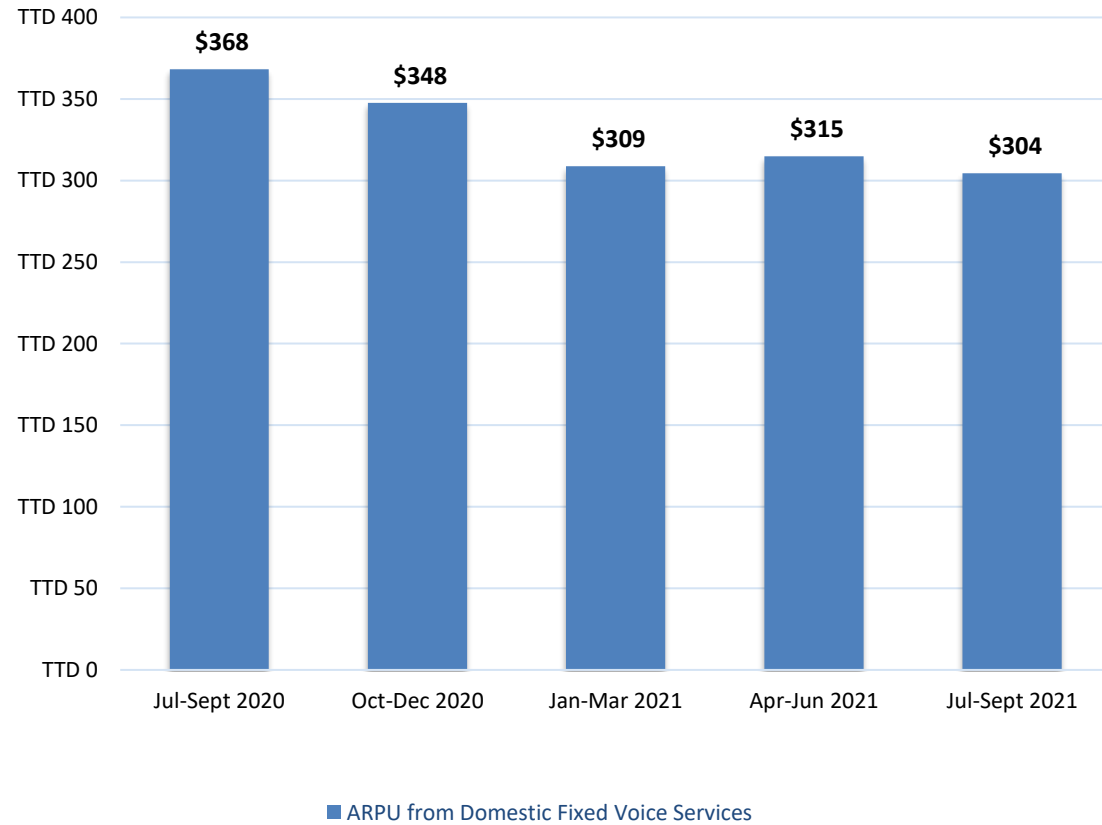


Y-o-Y
PERCENT
CHANGE
-17.3%

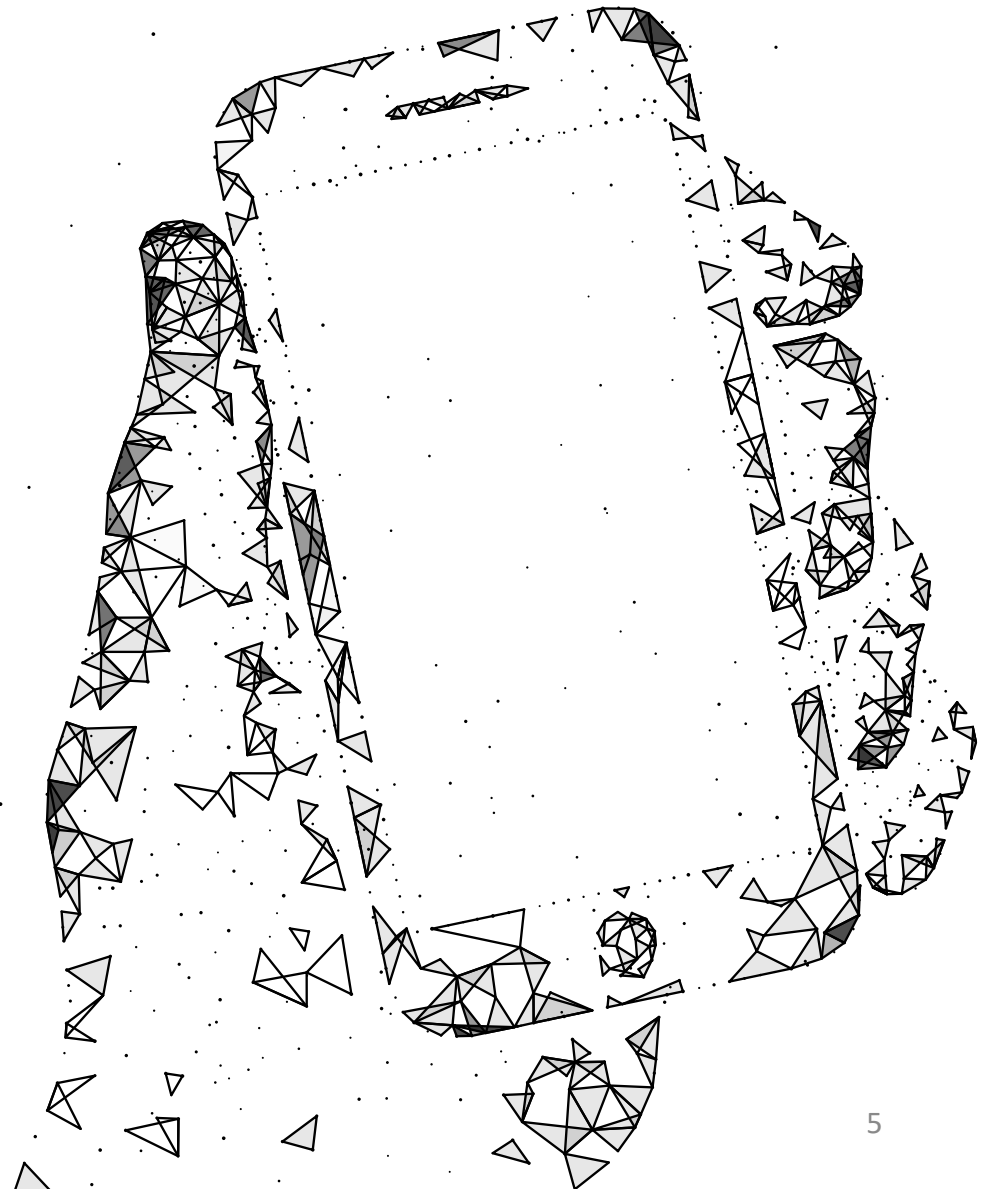


Q-o-Q
PERCENT
CHANGE
-3.3%

ARPU from Domestic Fixed Voice Services
from Q3 2020 to Q3 2021



Mobile Voice



Mobile Voice Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

1,964,900



Y-o-Y PERCENT CHANGE

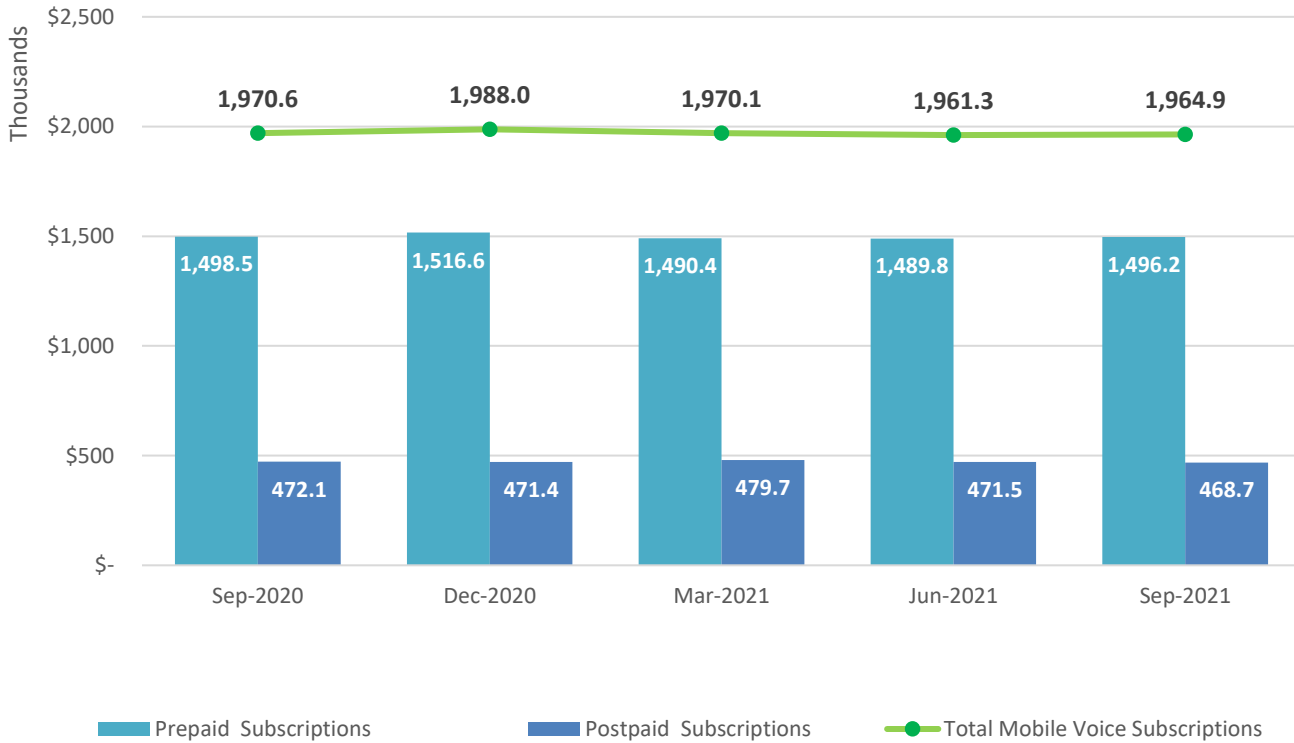
-0.3%



Q-o-Q PERCENT CHANGE

0.2%

Number of Mobile Voice Subscriptions from Q3 2020 to Q3 2021



Mobile Voice Penetration



**MOBILE VOICE
PENETRATION
PER 100
INHABITANTS**

144



**Y-o-Y
PERCENT
CHANGE**

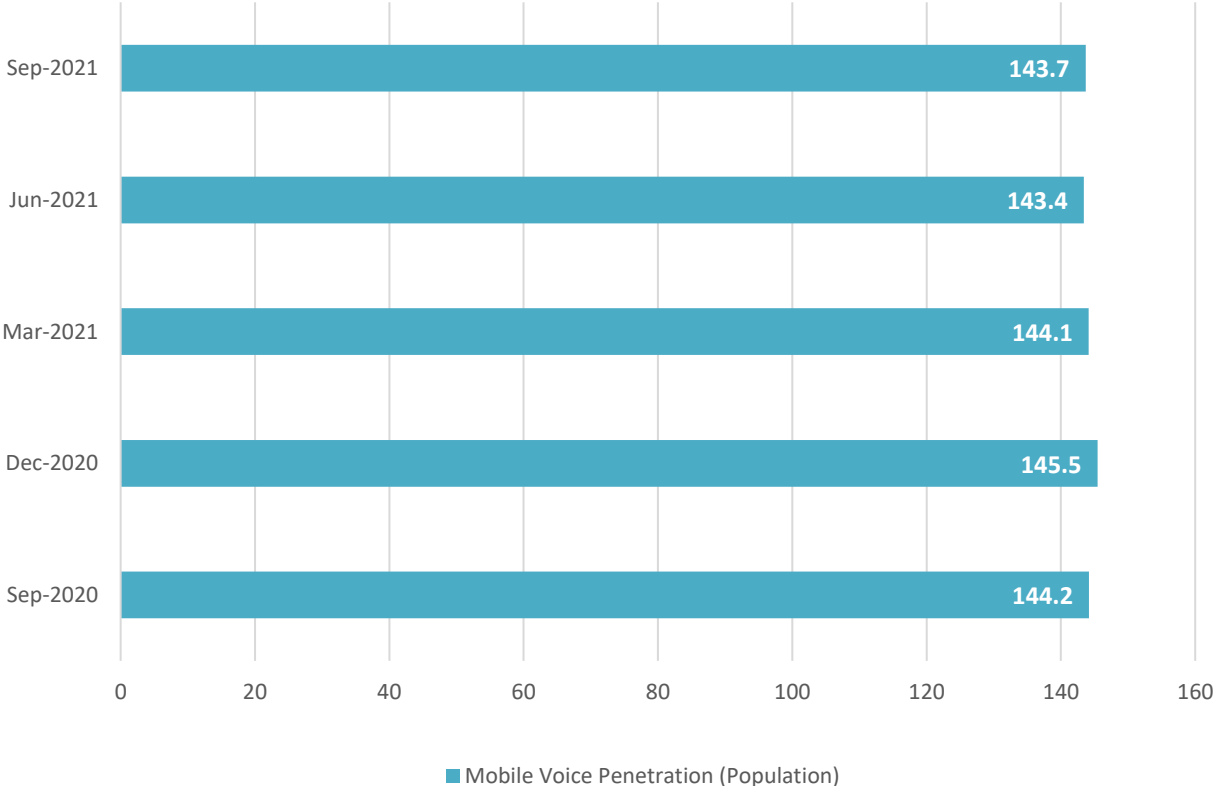
-0.4%



**Q-o-Q
PERCENT
CHANGE**

0.2%

Penetration of Mobile Voice Subscriptions
from Q3 2020 to Q3 2021



Mobile Services Revenues



GROSS REVENUES

\$470.2m



Y-o-Y PERCENT CHANGE

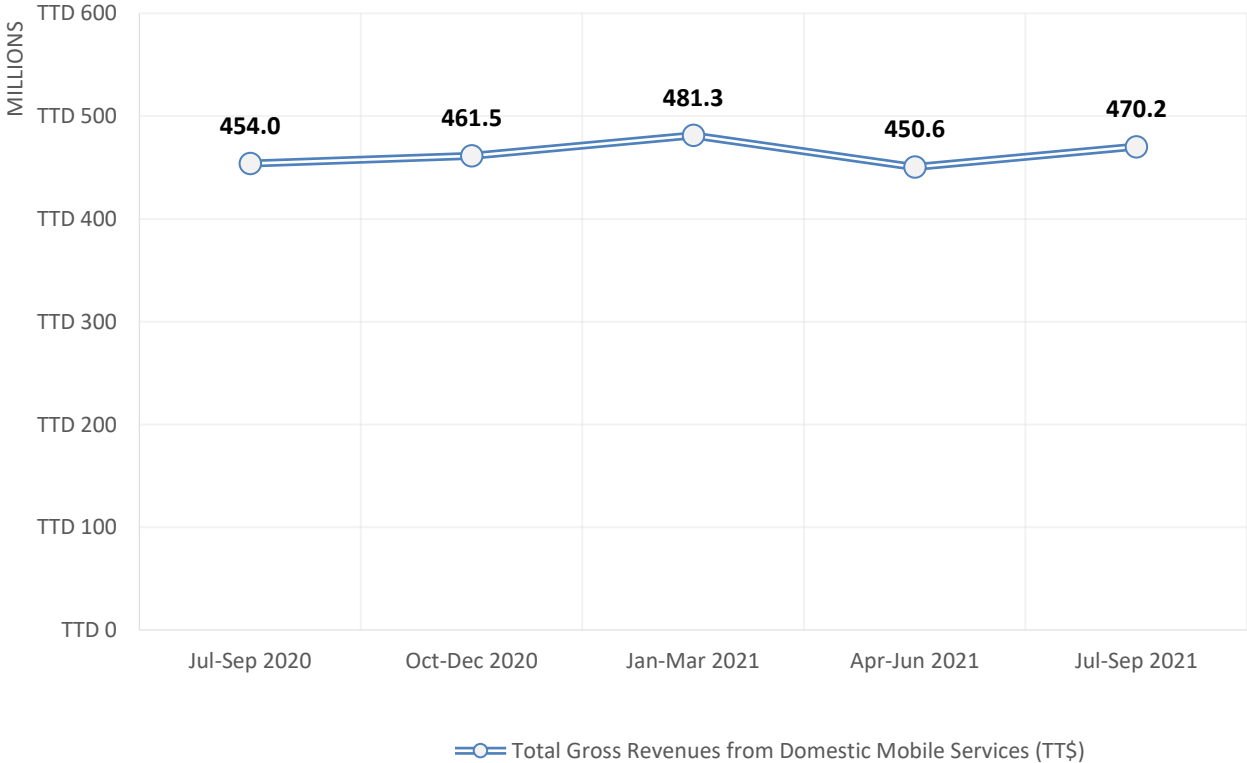
3.6%



Q-o-Q PERCENT CHANGE

4.4%

TOTAL GROSS REVENUES FROM DOMESTIC MOBILE SERVICES (TT\$) FROM Q3 2020 TO Q3 2021



Includes revenues from Mobile voice and Internet services.

Mobile Voice HHI



HHI

5,187



Y-o-Y
PERCENT
CHANGE

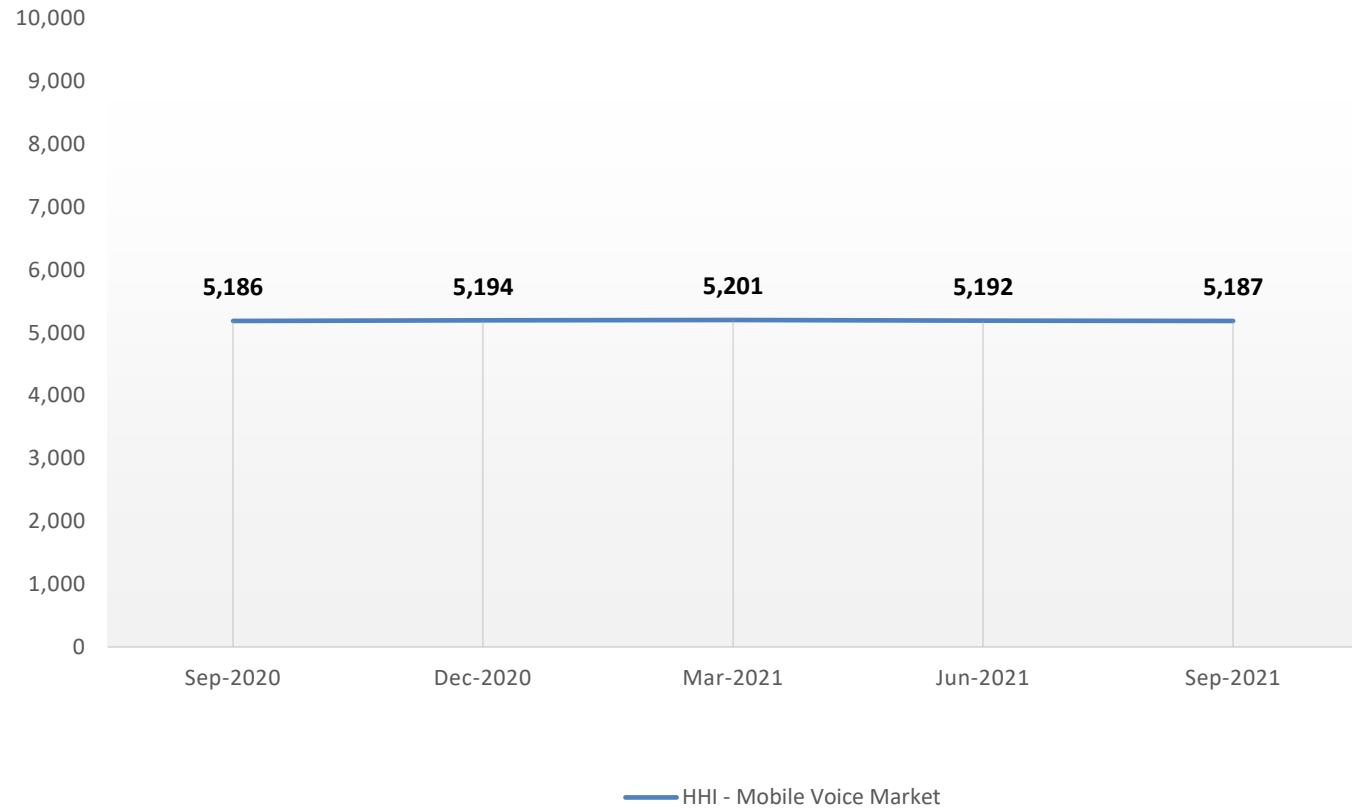
0.0%



Q-o-Q
PERCENT
CHANGE

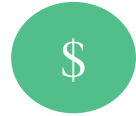
-0.1%

HHI for Domestic Mobile Services
from Q3 2020 to Q3 2021



Average Revenue Per User

Mobile Services



ARPU
\$241.5



Y-o-Y
PERCENT
CHANGE

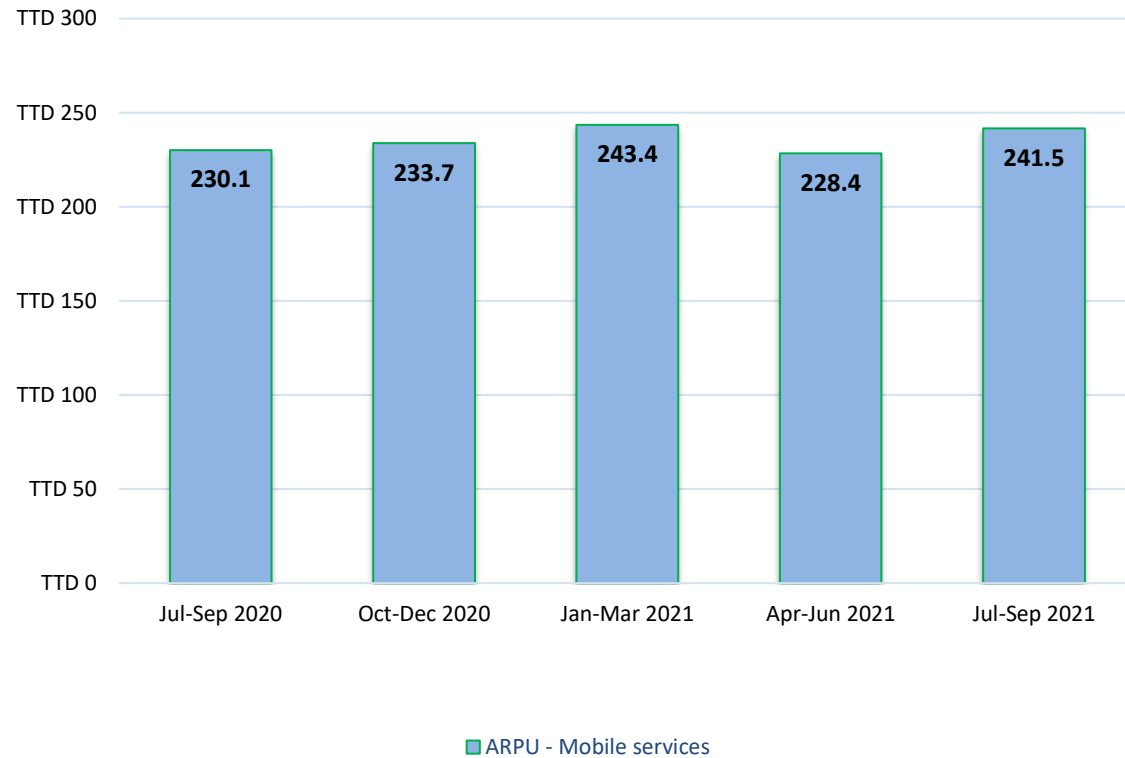
5.0%



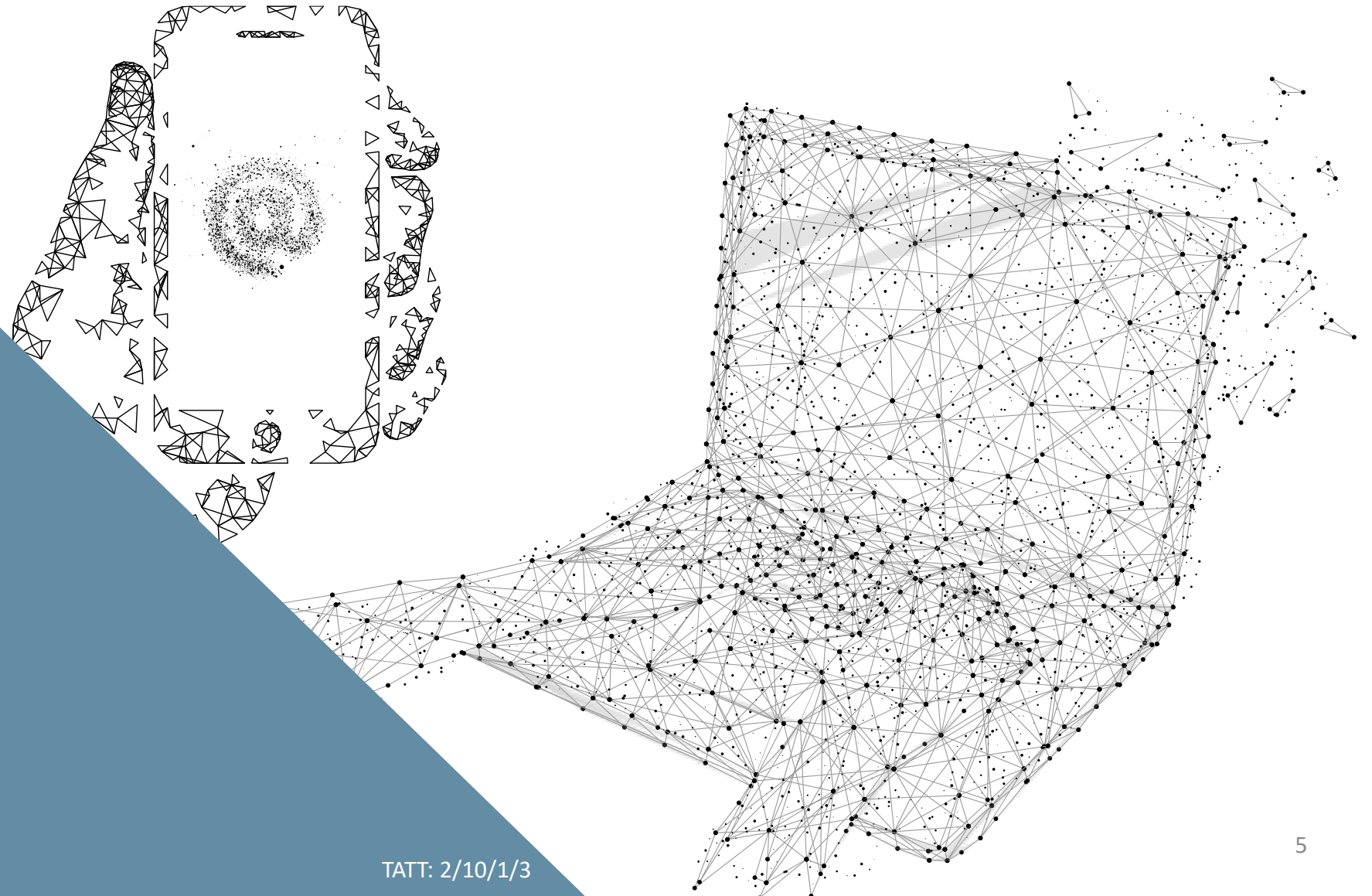
Q-o-Q
PERCENT
CHANGE

5.7%

ARPU for Domestic Mobile Services
from Q3 2020 to Q3 2021



Internet



Fixed Broadband Subscriptions



TOTAL NUMBER OF SUBSCRIPTIONS

365,300



Y-o-Y PERCENT CHANGE

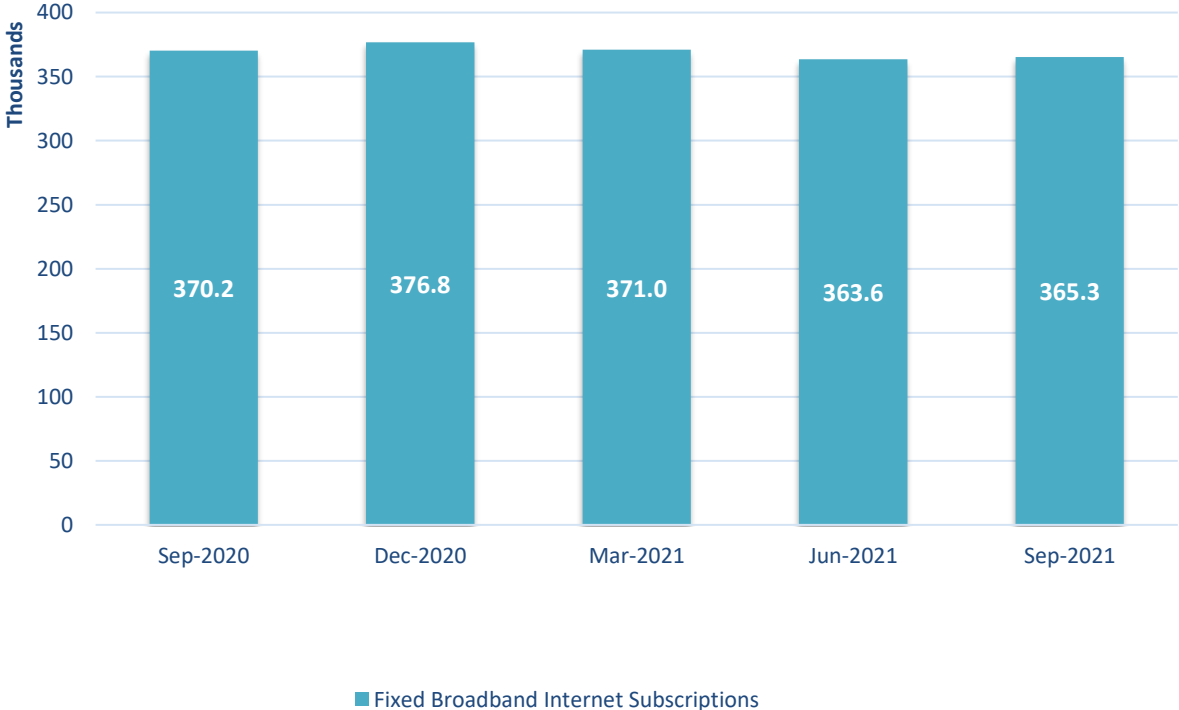
-1.3%



Q-o-Q PERCENT CHANGE

0.5%

Number of Fixed Broadband Internet Subscriptions from Q3 2020 to Q3 2021



Fixed Internet Penetration

Penetration for Fixed Internet Subscriptions
from Q3 2020 to Q3 2021



**FIXED INTERNET
PENETRATION
PER 100
INHABITANTS**

26.7



**Y-o-Y
PERCENT
CHANGE**

-1.3%



**Q-o-Q
PERCENT
CHANGE**

0.5%



**FIXED INTERNET
PENETRATION
PER 100
HOUSEHOLDS**

87.2



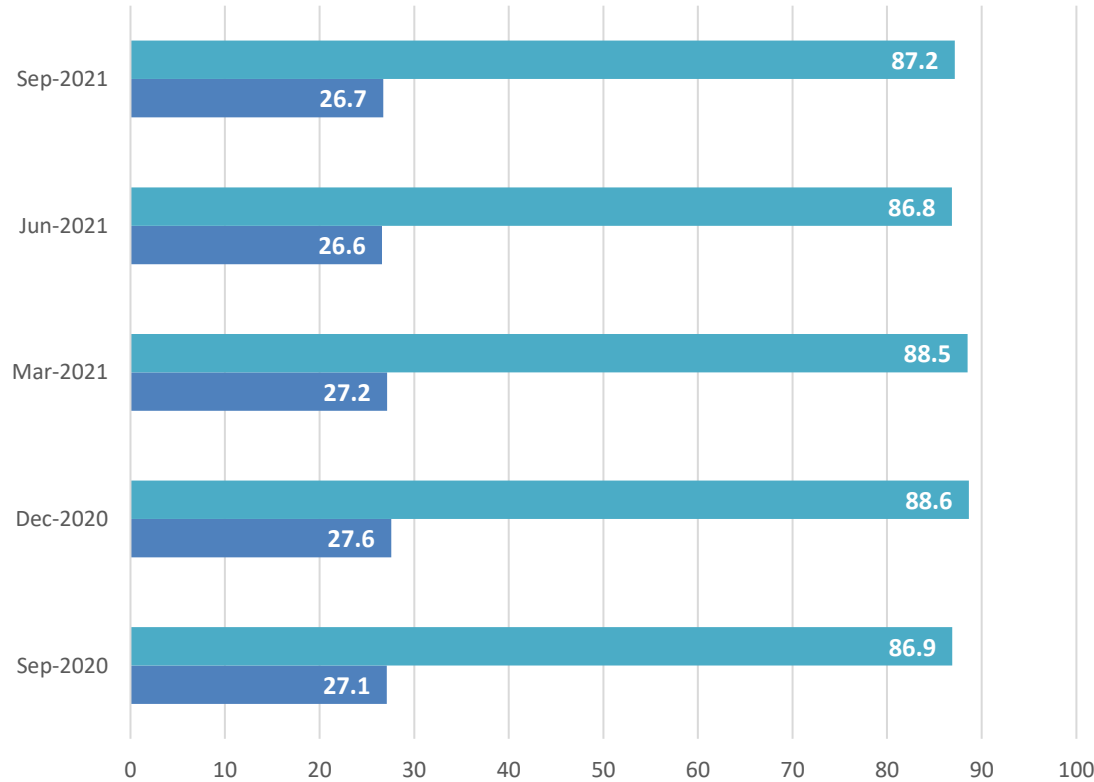
**Y-O-Y
PERCENT
CHANGE**

0.3%



**Q-O-Q
PERCENT
CHANGE**

0.4%



■ Fixed Internet Penetration (Household) ■ Fixed Internet Penetration (Population)

Mobile Internet Penetration



**MOBILE INTERNET
PENETRATION PER
100 INHABITANTS**

58.5



**Y-o-Y
PERCENT
CHANGE**

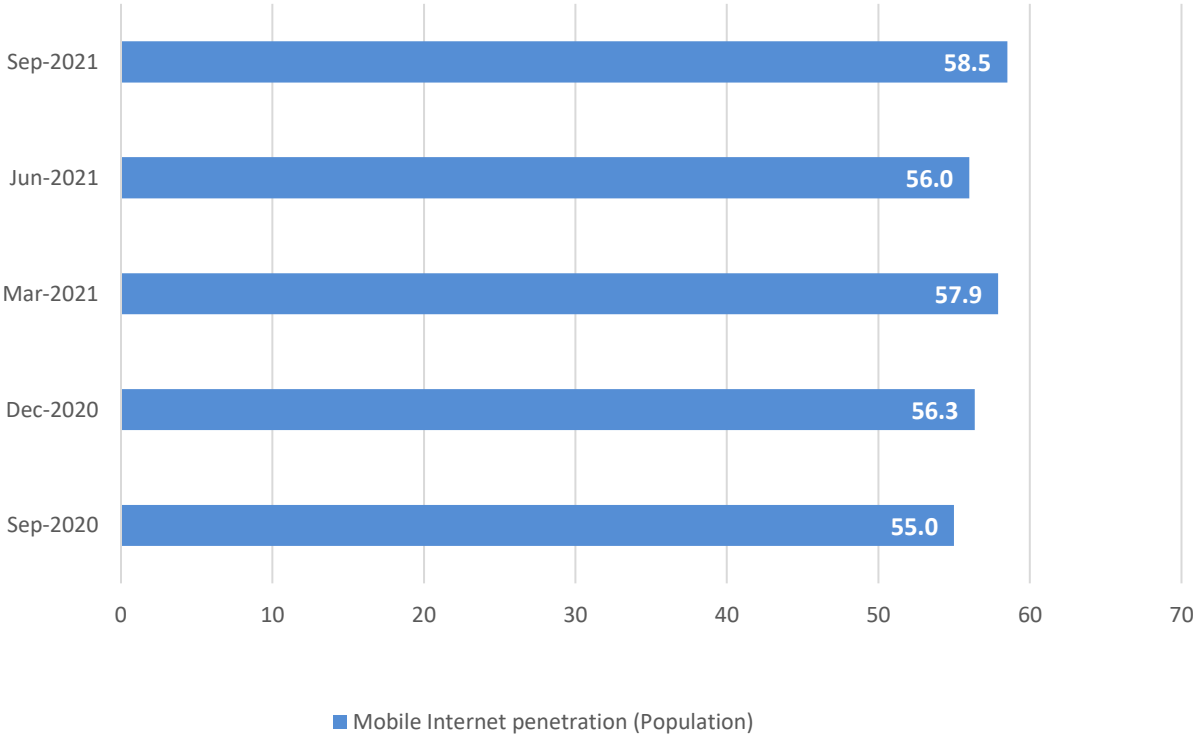
6.4%



**Q-o-Q
PERCENT
CHANGE**

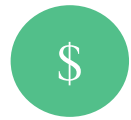
4.5%

Penetration for Mobile Internet Subscriptions
from Q3 2020 to Q3 2021



Calculated using the total number of Prepaid and Postpaid Mobile Internet users divided by the total population

Fixed Internet Revenues



GROSS REVENUES
\$310.5m

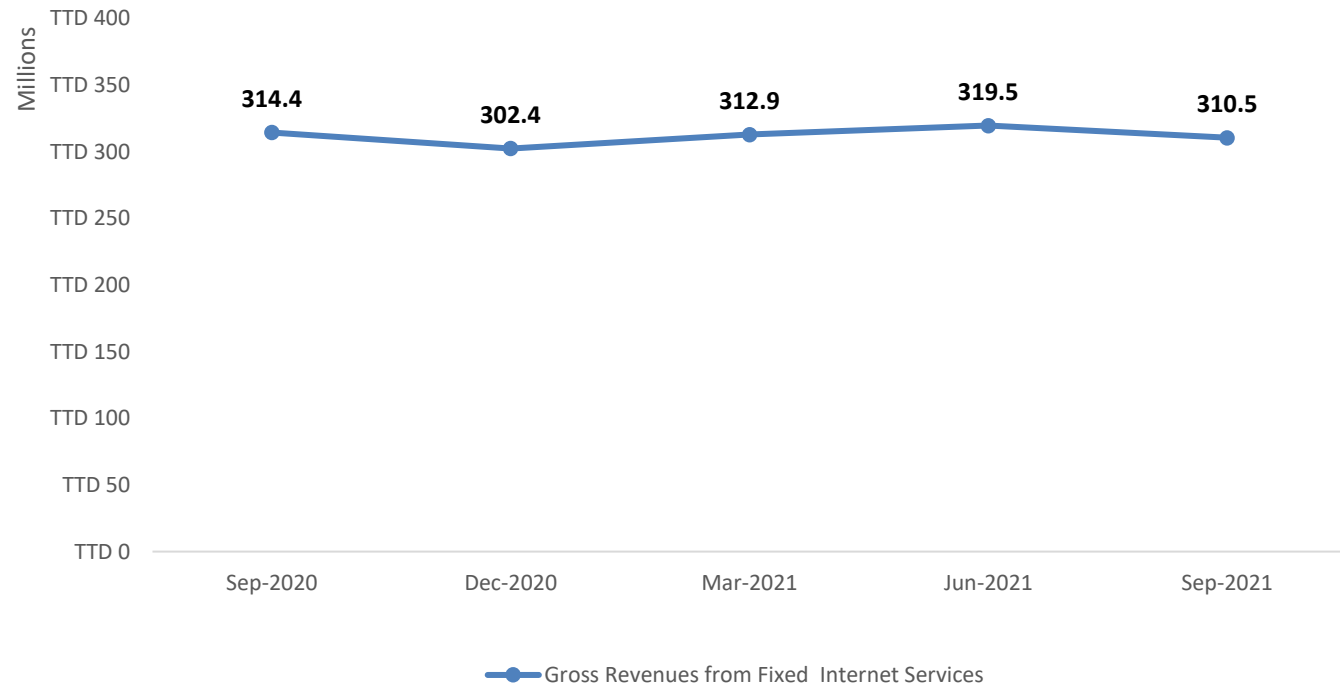


Y-o-Y PERCENT CHANGE
-1.2%



Q-o-Q PERCENT CHANGE
-2.8%

Gross Revenues from Fixed Internet Services
from Q3 2020 to Q3 2021



Fixed Internet HHI



HHI
2,893

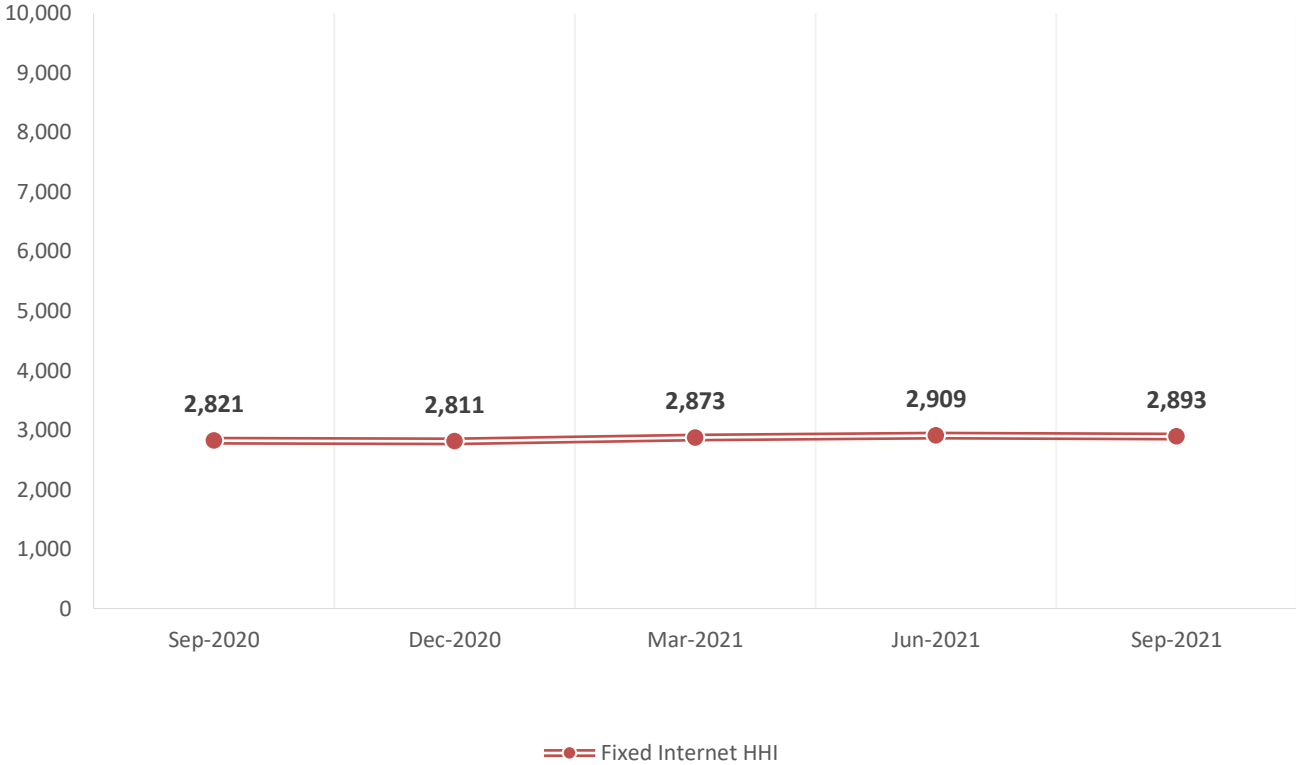


Y-o-Y
PERCENT
CHANGE
2.5%



Q-o-Q
PERCENT
CHANGE
-0.6%

HHI FOR FIXED INTERNET SERVICES
FROM Q3 2020 TO Q3 2021



Fixed Internet Average Revenue Per User



ARPU
\$854

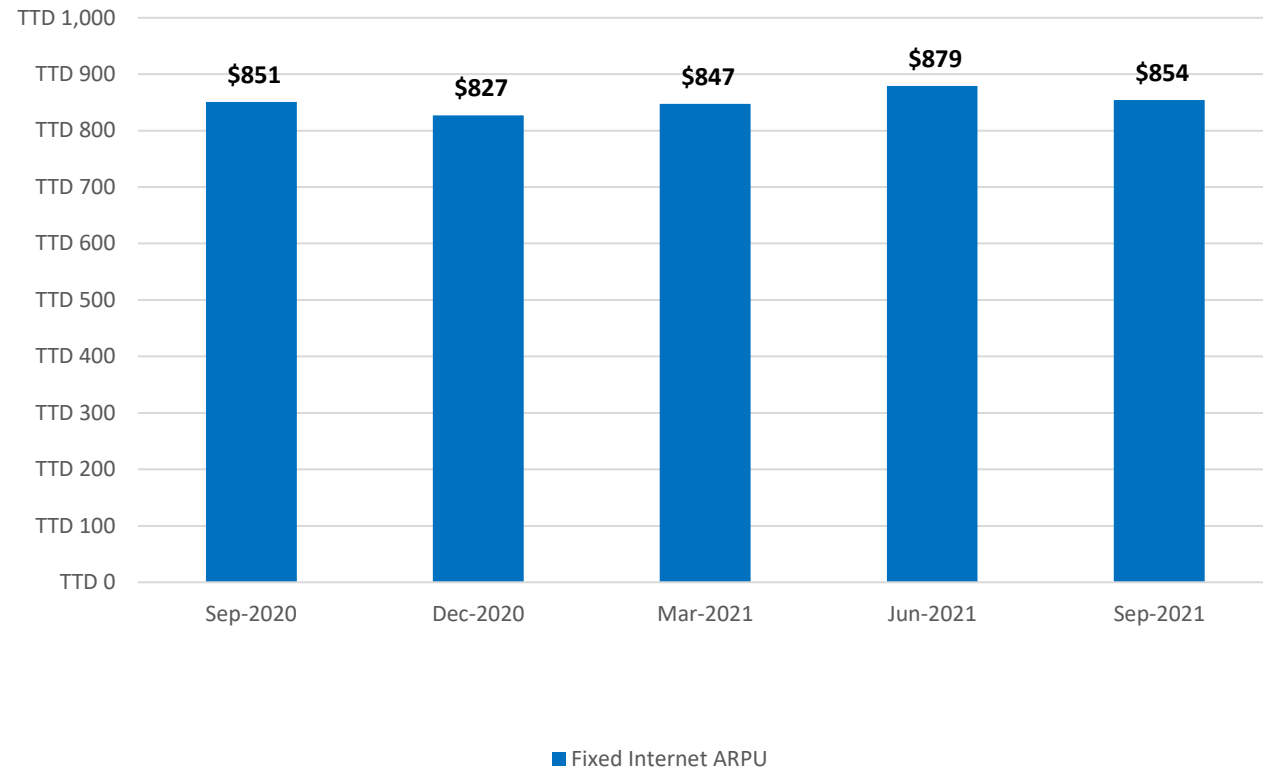


Y-o-Y
PERCENT
CHANGE
0.4%



Q-o-Q
PERCENT
CHANGE
-2.9%

ARPU for Fixed Internet Services
from Q3 2020 to Q3 2021



Pay TV



Pay TV Subscriptions



TOTAL NUMBER
OF
SUBSCRIPTIONS

237,800



Y-o-Y
PERCENT
CHANGE

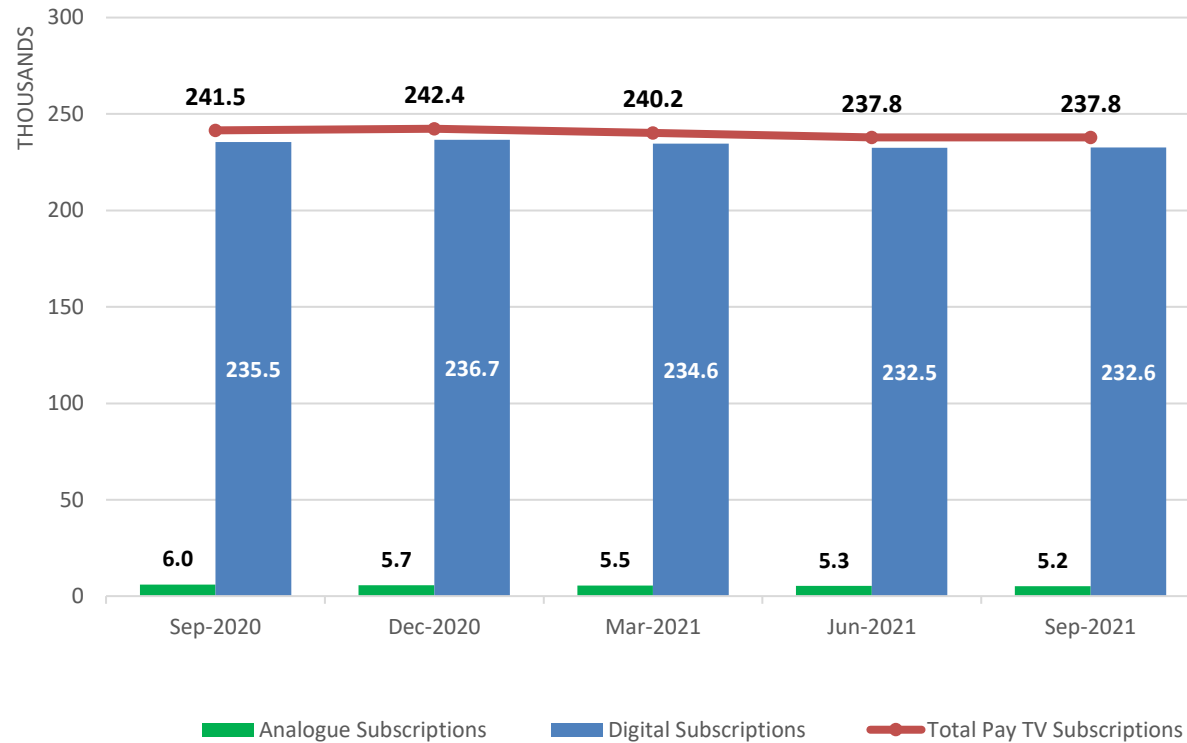
-1.5%



Q-o-Q
PERCENT
CHANGE

0.0%

Number of Pay TV Subscriptions
from Q3 2020 to Q3 2021



Pay TV Penetration



**PAY TV
PENETRATION
PER 100
INHABITANTS**

17.2



**Y-o-Y
PERCENT
CHANGE**

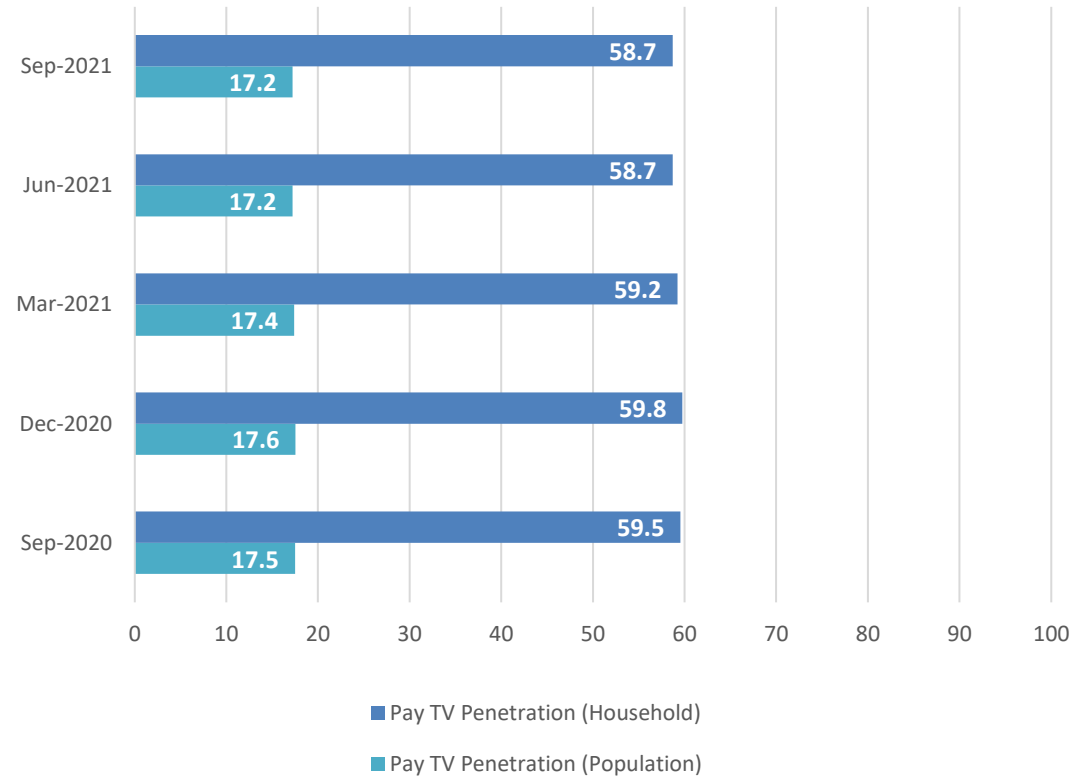
-1.5%



**Q-o-Q
PERCENT
CHANGE**

0.0%

Penetration Rates of Pay TV Services
from Q3 2020 to Q3 2021



**PAY TV
PENETRATION
PER 100
HOUSEHOLDS**

58.7



**Y-O-Y
PERCENT
CHANGE**

-1.4%



**Q-O-Q
PERCENT
CHANGE**

0.0%

Pay TV Revenues



GROSS REVENUES

\$162.5m



Y-o-Y PERCENT CHANGE

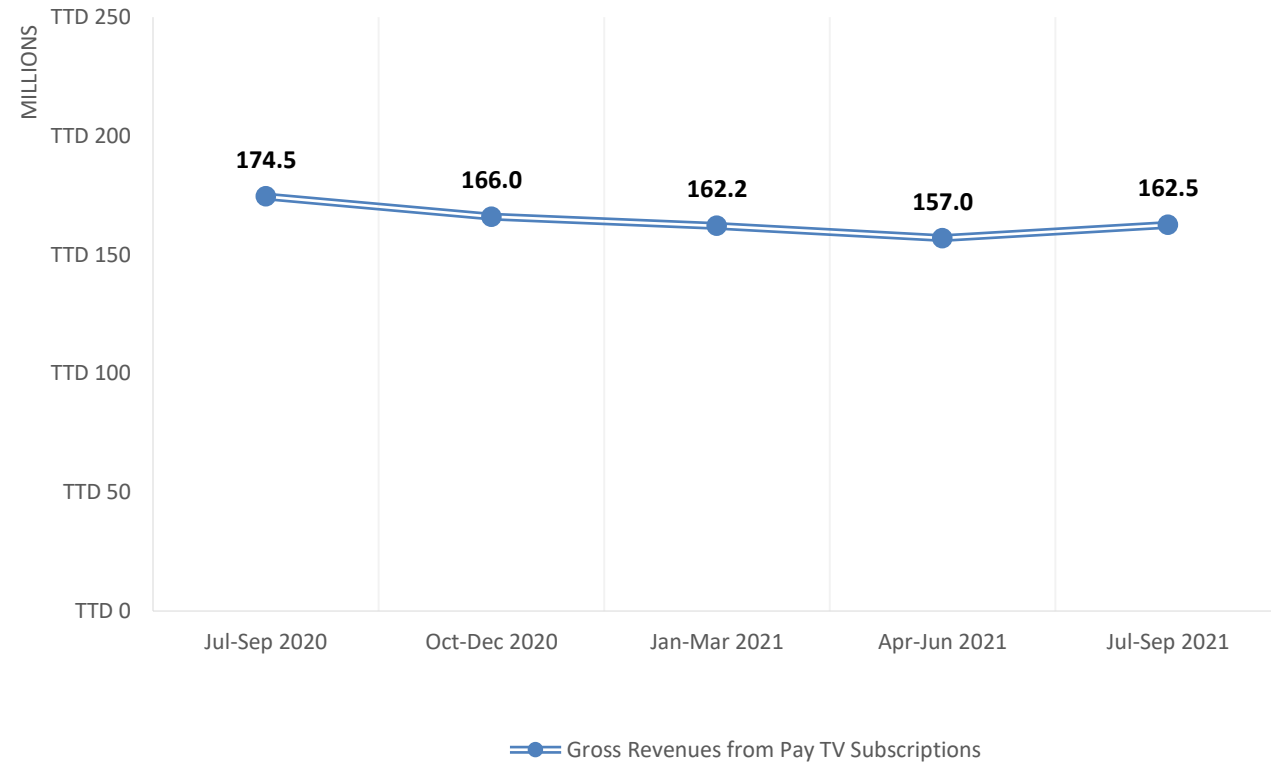
-6.9%



Q-o-Q PERCENT CHANGE

3.6%

GROSS REVENUES FROM PAY TV SERVICES FROM Q3 2020 TO Q3 2021



Pay TV HHI



HHI
3,317

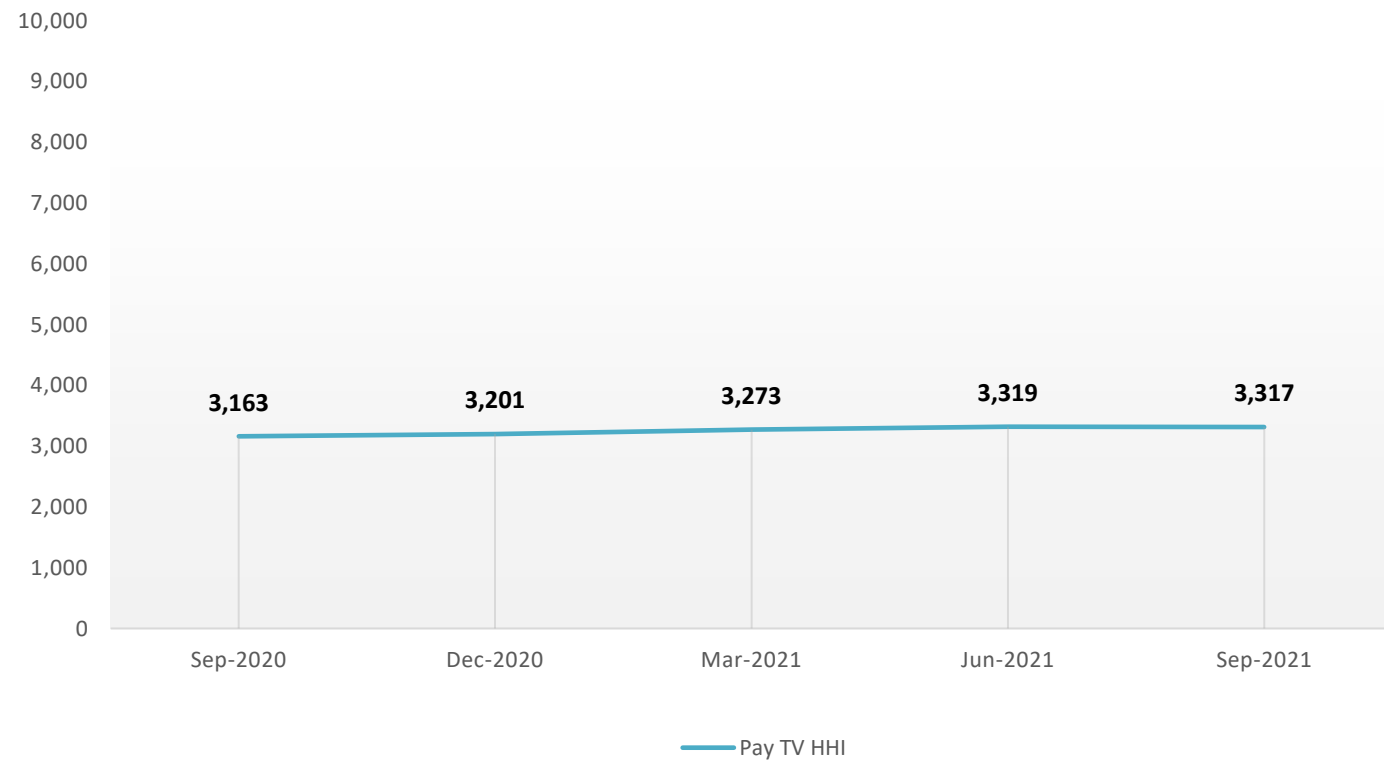


Y-o-Y
PERCENT
CHANGE
4.8%



Q-o-Q
PERCENT
CHANGE
-0.1%

HHI for Pay TV Services
from Q3 2020 to Q3 2021



Pay TV

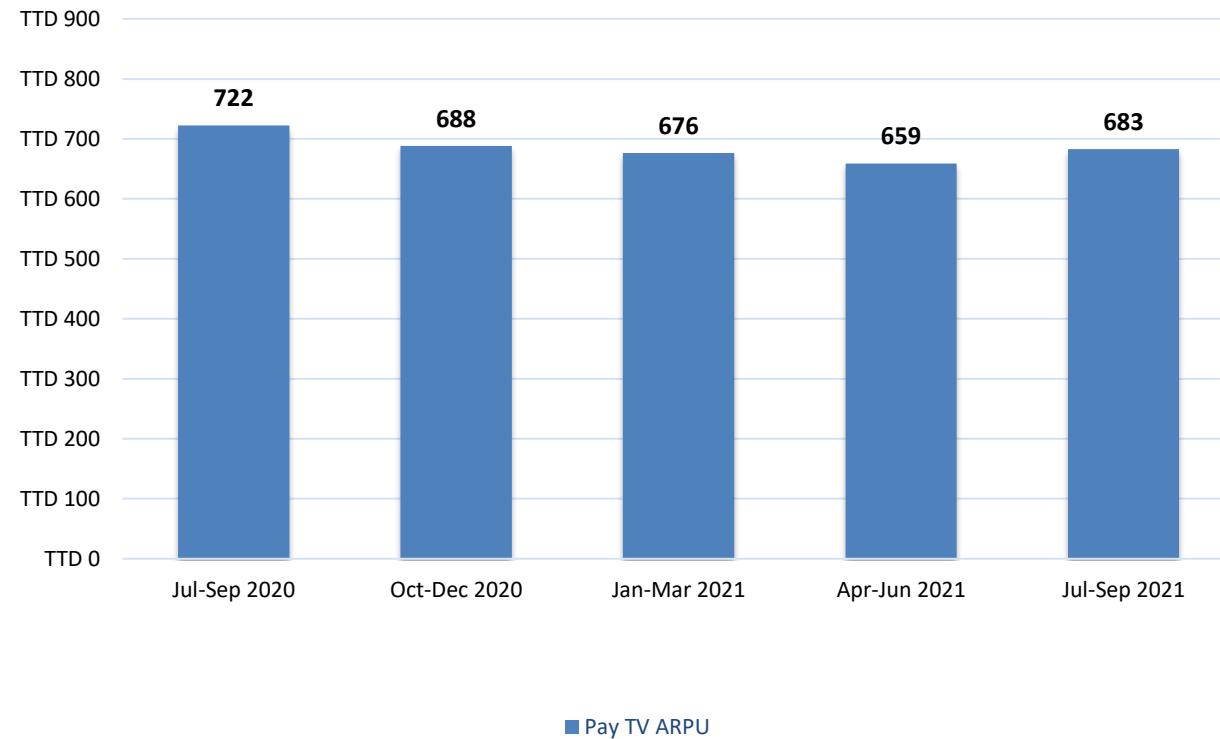
Average Revenue Per User

ARPU
\$ **\$683**

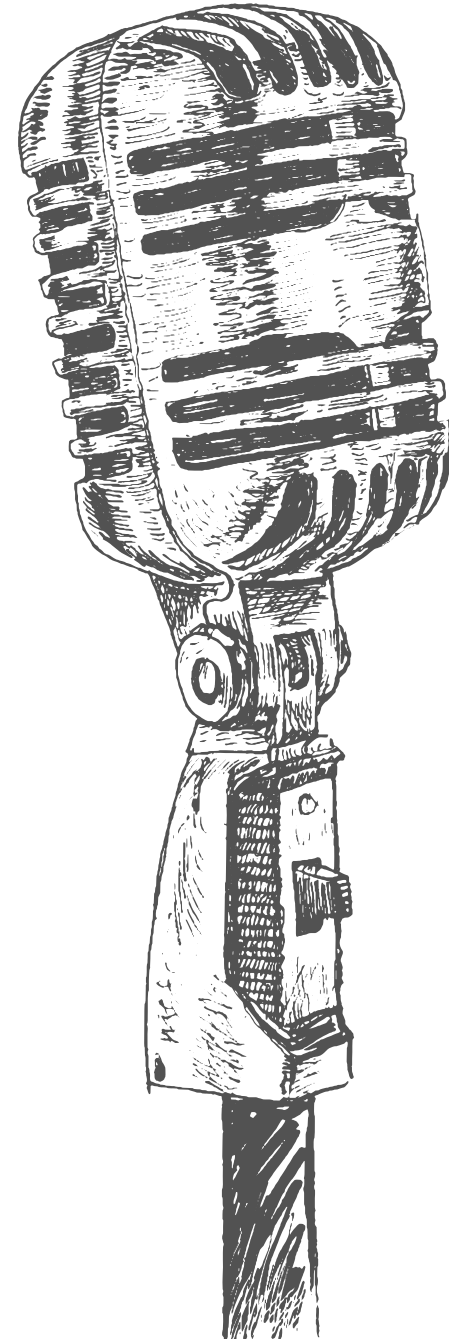
Y-o-Y
PERCENT
CHANGE
-5.4%

Q-o-Q
PERCENT
CHANGE
3.7%

ARPU for Pay TV Services
from Q3 2020 to Q3 2021



Free-to-Air Radio



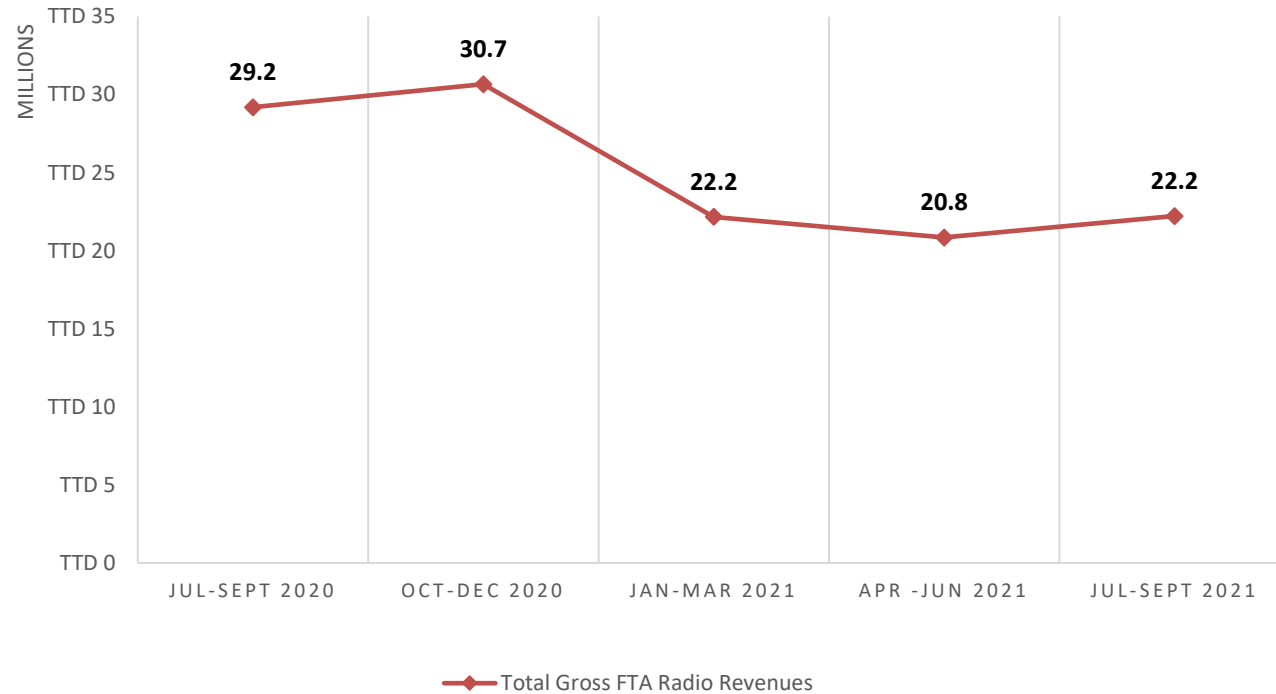
Free-to-Air Radio Revenues

\$
GROSS REVENUES
\$22.2m

Y-o-Y PERCENT CHANGE
-24%

Q-o-Q PERCENT CHANGE
6.6%

GROSS REVENUES FROM FREE TO AIR RADIO SERVICES FROM Q3 2020 TO Q3 2021



** Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca, Trinibashment Limited and Upward Trend Entertainment Limited*

Free-to-Air Radio HHI



HHI
442



Y-o-Y
PERCENT
CHANGE

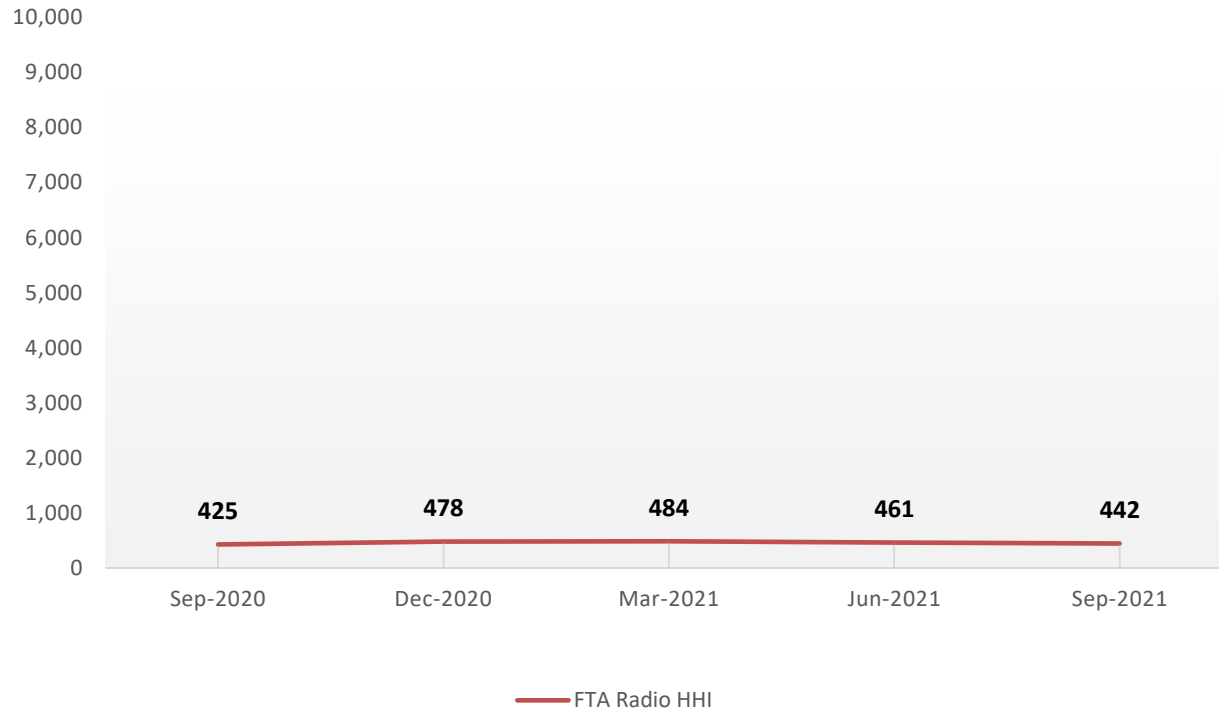
4%



Q-o-Q
PERCENT
CHANGE

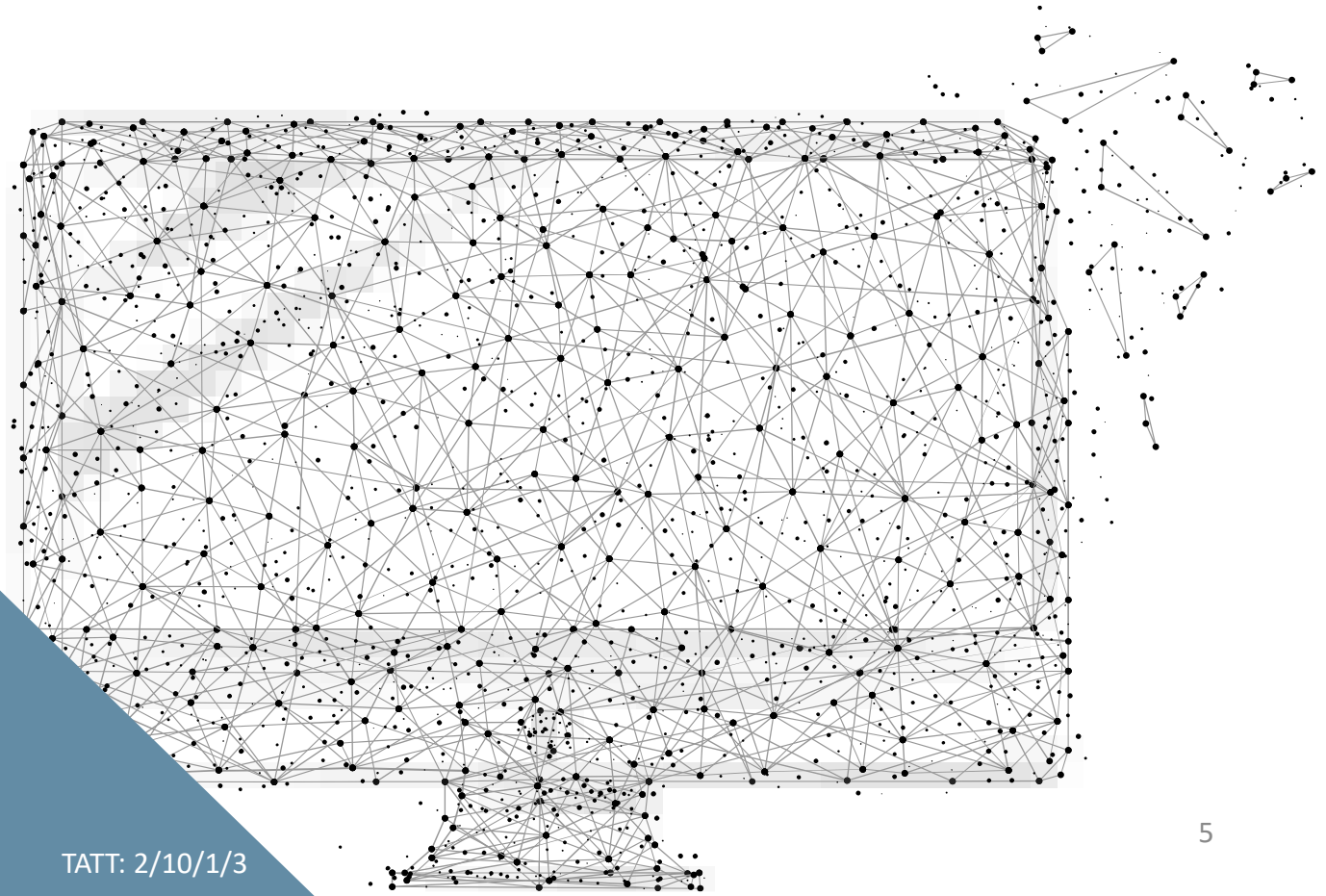
-4.2%

HHI FOR FREE TO AIR RADIO SERVICES
FROM Q3 2020 TO Q3 2021



** Data estimated for the following concessionaires who had not submitted data at the date of publication: Kaisoca, Trinibashment Limited and Upward Trend Entertainment Limited*

Free-to-Air TV



Free-to-Air TV Revenues



GROSS REVENUES

\$21m



Y-o-Y PERCENT CHANGE

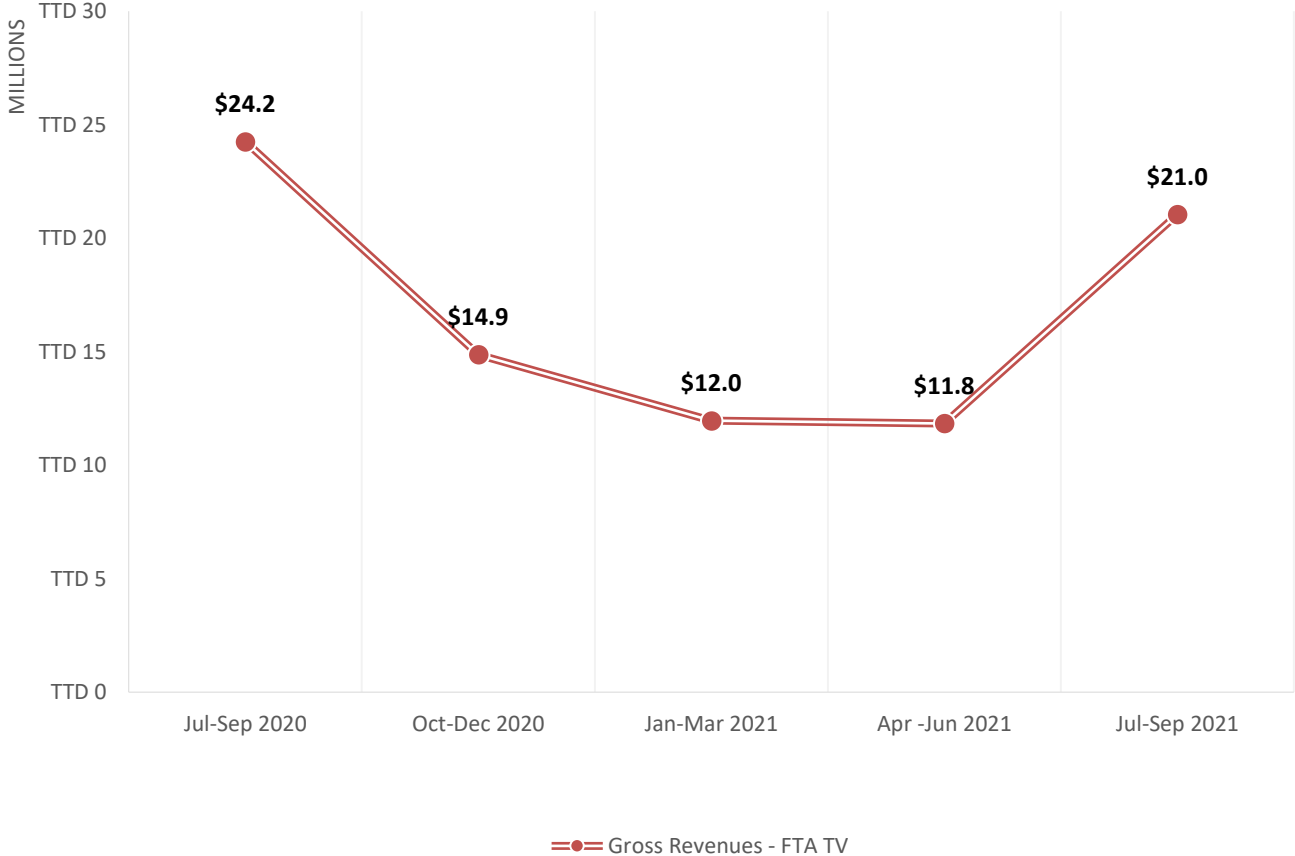
-13.2%



Q-o-Q PERCENT CHANGE

77.7%

GROSS REVENUES FROM FREE TO AIR TV SERVICES FROM Q3 2020 TO Q3 2021



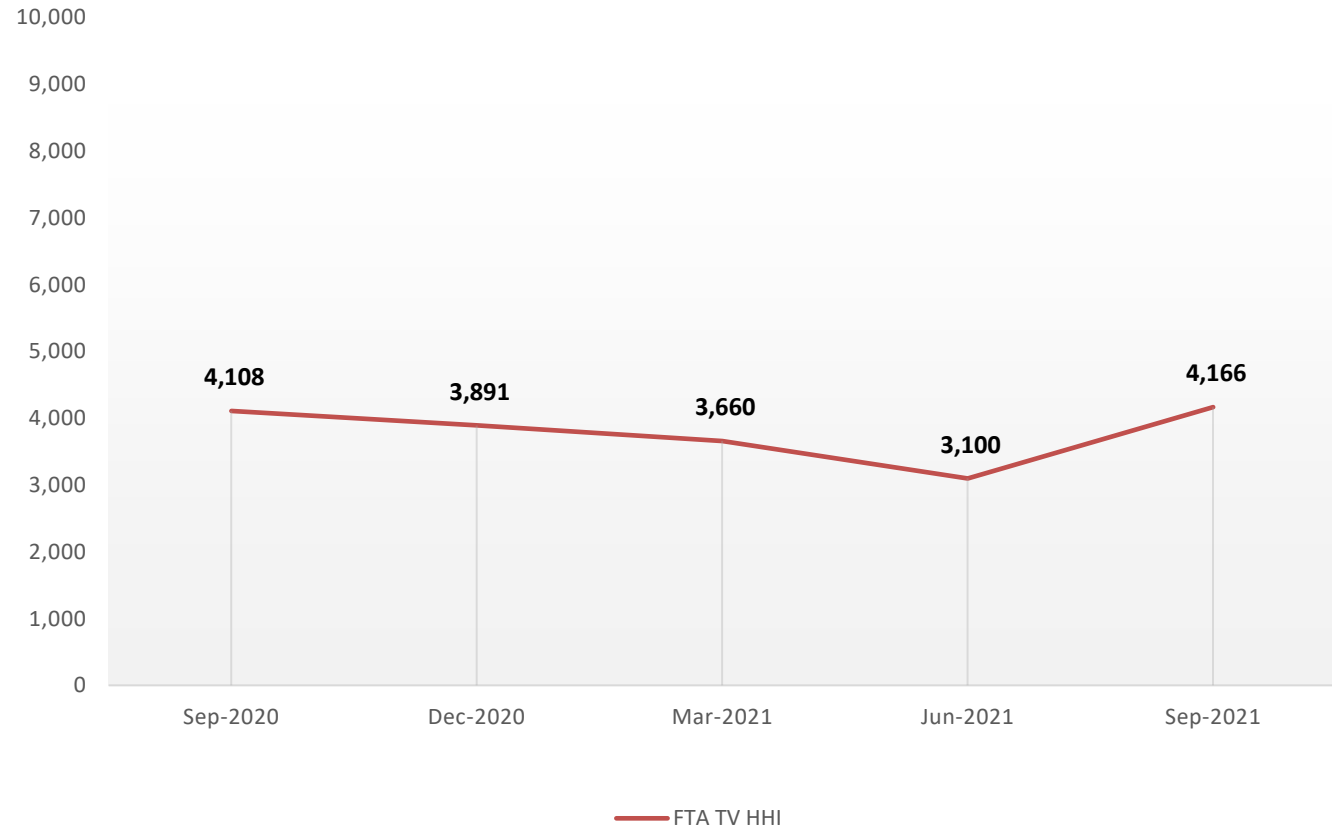
Free-to-Air TV HHI

HHI
4,166

Y-o-Y
PERCENT
CHANGE
1.4%

Q-o-Q
PERCENT
CHANGE
34.4%

HHI for Free to Air TV Services
Q3 2020 to Q3 2021



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